

CLAIMS:

1. A method in a remote computer network for interactively managing financial information, wherein said remote computer network has at least one client connectable to one or more servers, said method comprising the steps of:

5 designating a deal center database wherein deal information is stored;

10 specifying an investment management database wherein investment management information is stored;

15 establishing a financial management database wherein financial management information is stored; and

20 integrating each of said databases with one another in said remote computer network to thereby permit users to access information stored in said databases utilizing said remote computer network.

2. The method of claim 1 further comprising the steps of:

25 designating a deal center interface for interactively accessing deal center information stored in said deal center database;

30 specifying an investment management interface for interactively accessing investment management information stored in said investment management information database;

35 establishing a financial management interface for interactively accessing financial management information stored in said financial management information database; and

integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces.

5 3. The method of claim 2 further comprising the steps of:

associating said deal center database with said deal center interface;

10 associating said investment management database with said investment management interface; and

associating said financial management database with said financial management interface.

15 4. The method of claim 3 wherein the step of designating a deal center database wherein deal information is stored, further comprises the step of:

20 designating a deal center database wherein deal information is stored, including electronic mail, due-diligence checklists, and deal information templates.

25 5. The method of claim 4 wherein the step of designating a deal center interface for interactively accessing deal center information stored in said deal center database, further comprises the step of:

designating a tracking mechanism for interactively tracking electronic mail stored in said deal center database; and

permitting a user to retrieve particular electronic mail stored in said deal center database, in response to tracking said particular electronic mail utilizing said tracking mechanism.

5 6. The method of claim 5 wherein the step of integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces, further comprises the step of:

10 integrating said deal center interface with said investment management interface.

15 7. The method of claim 6 wherein the step of integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces, further comprises the step of:

20 integrating said investment management interface with said financial management interface.

25 8. The method of claim 7 wherein the step of integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces, further comprises the step of:

30 integrating an information delivery interface with said investment management interface; and

30 integrating said information delivery interface with said financial management interface.

9. The method of claim 8 further comprising the step of:

configuring said information delivery interface to permit users to generate particular reports based on data transferred from said investment management interface to said information delivery interface.

10. The method of claim 9 further comprising the step of:

configuring said information delivery interface to permit users to generate policy information.

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11. A system in a remote computer network for interactively managing financial information, wherein said remote computer network has at least one client connectable to one or more servers, said system comprising:

5 module for designating a deal center database wherein deal information is stored;

10 module for specifying an investment management database wherein investment management information is stored;

15 module for establishing a financial management database wherein financial management information is stored; and

20 module for integrating each of said databases with one another in said remote computer network to thereby permit users to access information stored in said databases utilizing said remote computer network.

25 12. The system of claim 11 further comprising:

20 module for designating a deal center interface for interactively accessing deal center information stored in said deal center database;

25 module for specifying an investment management interface for interactively accessing investment management information stored in said investment management information database;

30 module for establishing a financial management interface for interactively accessing financial management information stored in said financial management information database; and

module for integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces.

5 13. The system of claim 2 further comprising:

module for associating said deal center database with said deal center interface;

10 module for associating said investment management database with said investment management interface; and

module for associating said financial management database with said financial management interface.

15 14. The system of claim 13 wherein said module for designating a deal center database wherein deal information is stored, further comprises:

20 module for designating a deal center database wherein deal information is stored, including electronic mail, due-diligence checklists, and deal information templates.

15. The system of claim 14 wherein said module for designating a deal center interface for interactively accessing deal center information stored in said deal center database, further comprises:

25 module for designating a tracking mechanism for interactively tracking electronic mail stored in said deal center database; and

module for permitting a user to retrieve particular electronic mail stored in said deal center database, in response to tracking said particular electronic mail utilizing said tracking mechanism.

5 16. The system of claim 15 wherein said module for integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces, further comprises:

10 module for integrating said deal center interface with said investment management interface.

15 17. The system of claim 16 wherein said module for integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces, further comprises:

20 module for integrating said investment management interface with said financial management interface.

25 18. The system of claim 17 wherein said module for integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces, further comprises:

30 module for integrating an information delivery interface with said investment management interface; and

module for integrating said information delivery interface with said financial management interface.

19. The system of claim 18 further comprising:

5 module for configuring said information delivery interface to permit users to generate particular reports based on data transferred from said investment management interface to said information delivery interface.

20. The system of claim 19 further comprising:

10 module for configuring said information delivery interface to permit users to generate policy information.

21. A program product residing in computer memory in a remote computer network for interactively managing financial information, wherein said remote computer network has at least one client connectable to one or more servers, said program product comprising:

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instruction module for designating a deal center database wherein deal information is stored;

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instruction module for specifying an investment management database wherein investment management information is stored;

instruction module for establishing a financial management database wherein financial management information is stored; and

instruction module for integrating each of said databases with one another in said remote computer network to thereby permit users to access information stored in said databases utilizing said remote computer network.

22. The program product of claim 21 further comprising:

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instruction module for designating a deal center interface for interactively accessing deal center information stored in said deal center database;

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instruction module for specifying an investment management interface for interactively accessing investment management information stored in said investment management information database;

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instruction module for establishing a financial management interface for interactively accessing financial management information stored in said financial management information database; and

instruction module for integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces.

5 23. The program product of claim 22 further comprising:

instruction module for associating said deal center database with said deal center interface;

10 instruction module for associating said investment management database with said investment management interface; and

instruction module for associating said financial management database with said financial management interface.

15 24. The program product of claim 23 wherein said instruction module for designating a deal center database wherein deal information is stored, further comprises:

20 instruction module for designating a deal center database wherein deal information is stored, including electronic mail, due-diligence checklists, and deal information templates.

25 25. The program product of claim 24 wherein said instruction module for designating a deal center interface for interactively accessing deal center information stored in said deal center database, further comprises:

instruction module for designating a tracking mechanism for interactively tracking electronic mail stored in said deal center database; and

instruction module for permitting a user to retrieve particular electronic mail stored in said deal center database, in response to tracking said particular electronic mail utilizing said tracking mechanism.

5 26. The program product of claim 25 wherein said instruction module for integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces, further comprises:

10 instruction module for integrating said deal center interface with said investment management interface.

15 27. The program product of claim 26 wherein said instruction module for integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces, further comprises:

20 instruction module for integrating said investment management interface with said financial management interface.

25 28. The program product of claim 27 wherein said instruction module for integrating each of said interfaces with one another in said remote computer network to thereby permit users to access information stored in said databases through said interfaces, further comprises:

30 instruction module for integrating an information delivery interface with said investment management interface; and

 instruction module for integrating said information delivery interface with said financial management interface.

29. The program product of claim 28 further comprising:

instruction module for configuring said information delivery interface to permit users to generate particular reports based on data transferred from said investment management interface to said information delivery interface.

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30. The program product of claim 29 further comprising:

instruction module for configuring said information delivery interface to permit users to generate policy information.

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31. The program product of claim 30 wherein each of said instruction modules further comprise signal-bearing media.

32. The program product of claim 31 wherein said signal-bearing media comprises transmission media.

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33. The program product of claim 31 wherein said signal-bearing media comprises recordable media.

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